



# Account Management Guide



# List of Account Management Job Aids

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## Reviewer Job Aids

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# Register for a New NSF Account



To submit proposals to the National Science Foundation (NSF) and conduct other award-related activities using NSF systems, you must have an NSF ID. You may only have one NSF ID. This ID is a unique numerical identifier assigned to users by NSF through the registration process outlined below. The NSF ID is yours for you to use no matter your affiliation(s) in the future. Follow the step-by-step process to create a new NSF account.

## Step 1: Confirm you do not have an existing NSF account

- Access the [NSF ID Lookup](#) page to search for an existing NSF account.
- If you forgot your password for an established NSF account, [click here](#) to retrieve it. Note that your email address can only be associated with one NSF account (i.e., only one NSF ID per person).
- If you do have an existing NSF account and you know your password, you can edit your account profile information by selecting the “My Profile” option located on the top right of [Research.gov](#) homepage after signing in. [Click here](#) for detailed information on “My Profile” functions.
- If you do not have an existing NSF account, proceed to Step 2.



Figure 1

## Step 2: Access the Account Registration page

- Open [Research.gov](#)
- Click “Register” located at the top of the screen. (Figure 1)

## Step 3: Create a new NSF account

- Input the requested account registration information. (Figure 2)

**Important Note:** Your primary email address will be used for NSF account notifications including password resets. Please make sure you have ongoing access to this email account (e.g., a Gmail address). It is critical that you have continued access to this email account, even if you were to ever change organizations.

- Check the box to confirm that you are at least 13 years of age. (Figure 2)
- Click “Save & Preview.” (Figure 2)
- Verify that your account registration information is correct on the Preview Account Registration screen. (Figure 3)
- If you need to update your account registration information, select the “Edit” button to return to the previous screen.
- Check the box to confirm you are not a robot and click “Submit.” (Figure 3)
- You will receive an Account Registration Confirmation on the screen. (Figure 4)
- Check the primary email account that you just used for two messages: one containing your new NSF ID and another containing your temporary password.
- Click “Sign In” on [Research.gov](#) and enter your new NSF ID and temporary password. (Figure 1)
- Follow the instructions to change your temporary password.
- You have successfully registered for a new NSF account!

Figure 2

Figure 3

## Step 4: Add a new organization role

- Now that you have an NSF account, you can add organizational roles to your account profile. [Click here](#) for detailed instructions.

**Important Note:** Reviewers, GRFP Applicants and Fellows do not need to add an organizational role. GRFP Account Management training resources including guides and FAQs are available [here](#).

Figure 4





# Working at Multiple Organizations or Moving to Another Organization



It is National Science Foundation (NSF) policy that only one NSF account is allowed per user. If you already have an NSF account, you MAY NOT register for a new NSF account even if you are working at multiple organizations, moving to another organization, or working as a Postdoctoral Fellow. Instead, you can add roles to your existing NSF account.

## You do NOT need a separate NSF account for each organization you are affiliated with or a new NSF account when moving to a new organization or working as a Postdoctoral Fellow.

- You can have multiple organizations associated with your NSF account, and you can add new roles from different organizations to your existing NSF account.
  - For more information about adding an organization-approved role from a new organization or adding the Proposed Postdoctoral Fellow role, [click here](#).
- If you are associated with multiple organizations, be sure to update your designated Primary Organization on the “View My Roles” page. For more information on changing your Primary Organization, [click here](#).
- If you are leaving an organization, make sure the primary email address on your NSF account profile is set to an email address you will continue to have access to after your departure (e.g., a Gmail address). For more information on editing your NSF account profile, [click here](#).

## Adding a PI role at a new organization to your existing NSF account

- Click “Sign In” located at the top right of [Research.gov](#) page.
- Enter your credentials (e.g., NSF ID and password) and click “Sign In.”
- Click “My Profile” located at the top right of the screen.
- Click “Add a New Role” from the left navigation bar and the “Add a New Role” page will display. (Figure 1)
- To request the Investigator role, click the blue “Add Investigator or Authorized User Role” button located in the “Prepare Proposals and Manage Awards” box. (Figure 1)
- Select “Principal Investigator (PI) or co-Principal Investigator (co-PI)”, click “Submit” (Figure 2) and a four-step role request wizard will display. (Figure 3)

## Step 1: Find Organization

- Enter the organization’s System for Award Management (SAM) issued Unique Entity Identifier (UEI) and click “Search” (Figure 3). If you already have an organization-approved role at NSF, you may select the SAM UEI associated with your existing organization from the drop-down menu.
- Verify the correct organization is displayed and click “Next”. (Figure 3)

**Note:** For more information about SAM UEIs, please [click here](#) or contact your Sponsored Projects Office (SPO).

**Add a New Role**

For NSF ID

You must obtain the appropriate role to access certain features. Review the role options below and make a selection. An organization can also be added by selecting 'Add Organizational Role.'

**Prepare Proposals and Manage Awards**

Principal Investigator (PI), co-Principal Investigator (co-PI), Proposed Postdoctoral Fellow, Other Authorized User (OAU)

**Add Investigator or Authorized User Role**

PI/co-PI, Postdoctoral Fellow and OAU role details

**Add and Manage Organizations**

Administrator (Admin), Authorized Organizational Representative (AOR), Sponsored Projects Officer (SPO), View Only User

**Add Organizational Role**

Organizational role details

**Manage Financials in Award Cash Management Service (ACM\$)**

Awardee Preparer, Awardee Certifier, Awardee Financial Representative

**Add Financial Role**

Financial role details

**Register as a Graduate Research Fellowship Program (GRFP) Official**

Coordinating Official (CO), Alternate Coordinating Official (Alt. CO), Financial Official (FO)

**Add GRFP Official Role**

GRFP role details

Figure 1

**Select Role Type**

Select a role type to prepare proposals.

☒ Principal Investigator (PI) or co-Principal Investigator (co-PI)

☐ Other Authorized User (OAU)

☐ Proposed Postdoctoral Fellow

**Submit** Cancel

Figure 2

**Add a New Role to Prepare Proposals and Manage Awards**

1. Find Organization 2. Add Information 3. Choose Role(s) 4. Review

**Find Organization**

Enter Unique Entity Identifier (UEI) What is a UEI? How can I find

**Search** Clear

OR

Select from your Organization and UEI list

Select Organization

Cancel **Next**

Figure 3



## Step 2: Add Information

- Complete the required fields denoted by a red asterisk (\*) and click **“Next”**. (Figure 4)

## Step 3: Choose Role(s)

- The “Principal Investigator” role is pre-selected. Click **“Next”**. (Figure 5)

## Step 4: Review and Submit

- Review your information for accuracy and click **“Submit”**. (Figure 6)

## Success

- Your role request is sent to the listed Organizational Contacts for review and approval. (Figure 7)
- You have successfully submitted a role request!

**Important Note:** *Your Demographic Information will not be shared with the listed Organizational Contacts when they review and approve your role request.*

**Add a New Role to Prepare Proposals and Manage Awards**

1. Find Organization ✓ 2. Add Information 3. Choose Role(s) 4. Review

**Add Information**  
The contact information will be used for all communications when performing in approved roles for this organization

**\* Required**

**Your Contact Details**  
\* Work Phone Number: (111) 111-1111 \* Work Email: jake\_davis@nsf.gov

**Your Degree Information**  
The degree information entered here will be used to populate the printed Cover Sheet of your proposals to NSF.  
\* Highest Degree Type: BA - Bachelor of Arts \* Degree Year: 2019

**Your Work Address**  
\* Country: United States  
\* Street Address: 1 Test Road \* Street Address (Line 2): Department Name:  
\* City: Testor City \* State: Delaware \* Postal Code: 20054-1021

**Your Demographic Information**  
NSF asks for demographic data relating to gender, ethnicity/race and disability to gauge whether our programs and other opportunities in science and technology are fairly reaching and benefiting everyone regardless of demographic category, and to ensure that those in under-represented groups have the same knowledge of and access to programs, meetings, resources, and other research and educational opportunities as everyone else. For more information, read the Privacy Act Statement.

\* Gender (Please select one)  
☐ Male  
☐ Female  
☒ Unspecified, or another gender identity

\* Ethnicity (Please select one)  
☐ Hispanic or Latino  
☒ Not Hispanic or Latino  
☐ Do not wish to provide

\* Do you have a disability? (Please select one)  
☒ Yes  
☐ No  
☐ Do not wish to provide

\* Race (Please select all that apply)  
**Race Definitions**  
☐ American Indian or Alaska Native  
☐ Asian  
☒ Black or African American  
☐ Native Hawaiian or Other Pacific Islander  
☐ White  
☐ Other (Please specify)  
☐ Do not wish to provide

Cancel Previous **Next**

Figure 4

**Add a New Role to Prepare Proposals and Manage Awards**

1. Find Organization ✓ 2. Add Information ✓ 3. Choose Role(s) 4. Review

**Choose Role(s)**  
You will be registered for the following role: ☒ What is this role?

☒ Principal Investigator / co-Principal Investigator (PI/co-PI)

Cancel Previous **Next**

Figure 5

**Add a New Role to Prepare Proposals and Manage Awards**

1. Find Organization ✓ 2. Add Information ✓ 3. Choose Role(s) ✓ 4. Review

**Review**

**Your Contact Details**  
Organization Name: United States College  
SAM Legal Business Name: UNITED STATES COLLEGE  
Role: Principal Investigator / co-Principal Investigator  
Work Email: Doc.john@research.edu  
Work Phone Number: (123) 456-7890

**Your Degree Information**  
Highest Degree Type: AS - Associate in Science  
Degree Year: 2017

**Your Work Address**  
Country: United States  
Street Address: 1234 Street Address  
Street Address (Line 2): Department Name:  
City: Alexandria  
State: California  
Postal Code: 90036

**Your Demographic Information**  
Gender: Male  
Race: White  
Ethnicity: Not Hispanic or Latino  
Do you have a disability?: No

Cancel Previous **Submit**

Figure 6

**Add a New Role to Prepare Proposals and Manage Awards**

Success - your request has been forwarded to the organization contact(s) below. Check the status of this request on the [View My Roles](#) page.

Organization Contact(s)	Organization Contact Type
Doc, John	Administrator
Carey, Mariah	SAM POC
Jolie, Angelina	SAM POC
Doe, Jane	SAM POC

[Continue to My Profile](#)  
[Add Additional Roles](#)

Figure 7



## Helpful Tips

- Your primary email address is used for notifications about your NSF account including password resets.
- Your work email address is associated with all your roles at a particular organization. It is used for role requests and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Academic/Professional Information” tab in My Profile and on the “Edit Your Contact Information” page on “View My Roles” for all organizations where you have an organization-approved PI role.
- The Demographic Information section will be pre-populated if you have already provided this information. If you update this section, the demographic information changes will be reflected for all organizations where you have an organization-approved PI role and within the “Demographic Information” tab in My Profile.
- By default, the latest PI role will be set to primary.



# Navigating the Account Management Links



The Account Management system includes pages for Administrators to manage user and organization information and pages for users to self-manage their organizational roles and profile information. Access these pages and the functionality by signing in to [Research.gov](https://www.research.gov) and clicking on the “My Profile” link in the top right.

## Access the left navigation bar in Account Management

- Open [Research.gov](https://www.research.gov)
- Click “**Sign In**” located at the top right of the screen. (Figure 1)
- Enter your credentials (e.g., NSF ID and password) and click “**Sign In.**” (Figure 2)
- Click on “**My Profile**” located at the top right of the screen. (Figure 3)

**Important Note:** NSF enabled [Login.gov](https://www.login.gov) to sign in to Research.gov in 2022. Use of Login.gov to sign in to Research.gov is optional, and the research community is still able to use their NSF account or their university-issued credentials through the InCommon integration to sign in to Research.gov. Users can use any of the three options to sign in to Research.gov and will be navigated to the Research.gov homepage after successful sign-in. This guide provides instructions for only the “NSF Account” sign in option.



Figure 1

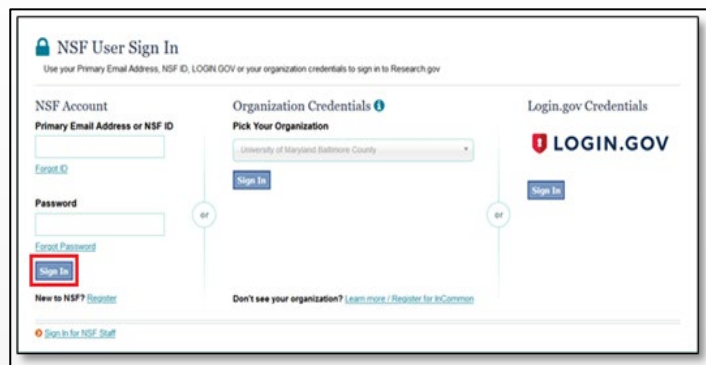


Figure 2

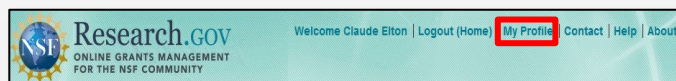


Figure 3

## Where do the left navigation bar links take me?

Account Management Link	Functionality
My Profile / View/Edit My Profile	View and edit your profile, demographic and academic information
Change Password	Change your Research.gov and FastLane password
View My Roles	View pending and active roles, and edit organizational contact information
Add a New Role	Request a new role from an organization such as a Principal Investigator role
View My Users	<i>You will only see this link if you're an Administrator of an organization.</i>  Approve and disapprove role requests, add and remove user roles, add and remove users from your organization, and invite users to create an NSF account so they can join your organization
About Account Management	Access job aids, instructional videos, and FAQs to guide you through the Account Management functionality
Proposals, Awards, & Status	Access the FastLane Proposals, Awards, & Status page. This page will open in a new tab
Research Administration	Access the FastLane Research Administration page. This page will open in a new tab



## View and Edit My NSF Account Profile Information



Once you have a National Science Foundation (NSF) account, you can view and edit your account profile information at any time via the View/Edit My Profile page. Follow the step-by-step instructions below to update your account information including contact information, demographic information, and professional information. Demographic Information is only displayed for Principal Investigators (PIs) and reviewers.

## Step 1: Access the View/Edit My Profile page

- Open [Research.gov](https://research.gov)
- Click “Sign In” located at the top right of the screen. (Figure 1)
- Enter your credentials (e.g., NSF ID and password) and click “Sign In.” (Figure 2)
- Click “My Profile” from the top right of the screen. (Figure 3)

**Important Note:** You can also access the View/Edit My Profile page by clicking on “View/Edit Profile” located on the left navigation bar. (Figure 4)

## Step 2: Edit your Contact Information

- Click “Edit” at the bottom of the **Contact Information** tab in the **My Profile** page. (Figure 5)
- Enter your updated contact information and click “Save.” (Figure 6)

**Important Note:**

- **If you change your primary email address (i.e., the email address used to create your NSF account), NSF will send you a verification email. You must verify the updated email address within four hours or your account email address will revert back to your last verified email address.**



Figure 1

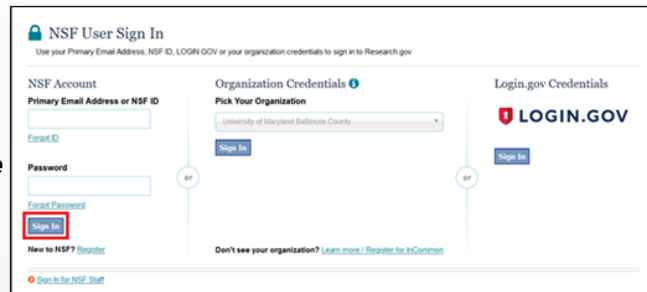


Figure 2

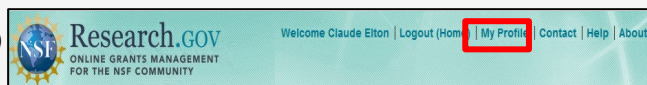


Figure 3

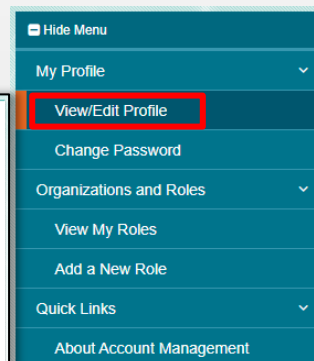


Figure 4

**My Profile**  
For NSF ID [redacted]

Update your profile information here. If you have a role at an organization, you can update your organization-specific information on [View My Roles](#).

**Contact Information** | Demographic Information | Academic/Professional Information

**\* Required**

Prefix  
Select Prefix

**\* First Name** Jane **Middle Name/Initial** M **\* Last Name** Doe

Suffix  
Select Suffix

Alternate Name(s) (Nickname, Former Name, etc.)

**\* Primary Email Address** (For NSF Account Password Recovery)  
Jane.DoeTEST@test.com

Secondary Email Address

Phone Number  
(111) 111-1111

Extension

Save Cancel

Figure 5

Figure 6



### Helpful Tip

To ensure compliance with NSF’s policy of allowing only one NSF account per user, you will not be able to save any email addresses to your account profile that are associated with another NSF account.





## Step 3: Edit your Demographic Information (Individuals with a PI role and for reviewers only)

- Click “**Edit**” at the bottom of the **Demographic Information** tab in the **My Profile** page. (Figure 7)
- Enter your demographic information for Gender, Race, Ethnicity and Disability status and click “**Save**.” (Figure 8)

### Important Notes:

- Submission of the requested demographic information is required for individuals with a PI role and for reviewers. Until responses to all demographic questions are provided, the “Save” button will be disabled.** (Figure 8)
- The “Other” option for the Race question will prompt an optional free text field for entry.** (Figure 8)
- Users without a PI role and non-reviewers will not have the Demographic Information tab within “My Profile.”** (Figure 9)

My Profile  
For NSF ID [redacted]

Contact Information Demographic Information Academic/Professional Information

NSF asks for demographic data relating to gender, ethnicity/race and disability to gauge whether our programs and other opportunities in science and technology are fairly reaching and benefiting everyone regardless of demographic category; and to ensure that those in under-represented groups have the same knowledge of and access to programs, meetings, vacancies, and other research and educational opportunities as everyone else. For more information, read the [Privacy Act Statement](#).

Gender  
Unspecified, or another gender identity

Race  
White

Ethnicity  
Not Hispanic or Latino

Do you have a disability?  
No

**Edit**

Figure 7

My Profile  
For NSF ID [redacted]

Contact Information Demographic Information Academic/Professional Information

NSF asks for demographic data relating to gender, ethnicity/race and disability to gauge whether our programs and other opportunities in science and technology are fairly reaching and benefiting everyone regardless of demographic category; and to ensure that those in under-represented groups have the same knowledge of and access to programs, meetings, vacancies, and other research and educational opportunities as everyone else. For more information, read the [Privacy Act Statement](#).

\* Required

\* Gender (Please select one)  
☐ Male  
☐ Female  
☒ Unspecified, or another gender identity  
☐ Do not wish to provide

\* Ethnicity (Please select one)  
☐ Hispanic or Latino  
☒ Not Hispanic or Latino  
☐ Do not wish to provide

\* Race (Please select all that apply)  
**Race Definitions**  
☐ American Indian or Alaska Native  
☐ Asian  
☐ Black or African American  
☐ Native Hawaiian or Other Pacific Islander  
☒ White  
☒ Other (Please specify) [text field]  
☐ Do not wish to provide

\* Do you have a disability? (Please select one)  
**What is considered a disability?**  
☐ Yes  
☒ No  
☐ Do not wish to provide

**Save** Cancel

Figure 8

My Profile  
For NSF ID [redacted]

Contact Information Academic/Professional Information

Name  
John Doe

Alternate Name(s)  
None Provided

Primary Email Address ⓘ (For NSF Account Password Recovery)  
john\_doe@bc.com

Secondary Email Address ⓘ  
None Provided

Phone Number  
None Provided

**Edit**

Figure 9





### Step 4: Edit your Academic/Professional Information

- Click **“Edit”** at the bottom of the **Professional Information** tab in the **My Profile** page. (Figure 10)
- Enter your updated academic and professional information and click **“Save”**. (Figure 11)

#### **Important Notes:**

- Highest Degree and Area(s) of Expertise are required for PIs and reviewers and optional for all other users.** (Figure 11)
- Upon selection of your Highest Degree, you will be prompted to provide the Year Completed.** (Figure 11)
- If your Area(s) of Expertise is not listed, you may enter a free text entry using the “Other” option.** (Figure 12)

My Profile  
For NSF ID [redacted]

Contact Information Demographic Information **Academic/Professional Information**

Update your profile information here. If you have a role at an organization, you can update your organization-specific information on [View My Roles](#).

NSF asks for professional information to enable program officials to manage reviewer selection, as well as related merit review functions. For more information, read the [Privacy Act Statement](#).

Highest Degree  
ScD - Doctor of Science (1989)

Area(s) of Expertise  
Zoology  
Agricultural Engineering

ORCID ID   
None Provided

Websites  
Websites may be used for NSF selection of reviewers.  
[test.org](#)

**Edit**

Figure 10

My Profile  
For NSF ID [redacted]

Contact Information Demographic Information **Academic/Professional Information**

Update your profile information here. If you have a role at an organization, you can update your organization-specific information on [View My Roles](#).

NSF asks for professional information to enable program officials to manage reviewer selection, as well as related merit review functions. For more information, read the [Privacy Act Statement](#).

\* Required

**Degree**

\* Highest Degree \* Year Completed  
ScD - Doctor of Science 1989

**Area(s) of Expertise**

Select up to five items that best describe your area(s) of expertise.  
If your area of expertise is not listed, you may add your own by selecting "Other (Please specify)."

\* Area(s) of Expertise Add up to five

1. Zoology

2. Agricultural Engineering

+ Add Area of Expertise

**Professional References**

ORCID ID 16-digits i.e., 1234-1234-1234-1234

Websites (e.g., Organizational faculty, staff profile, or professional website, LinkedIn, Google Scholar)  
Websites may be used for NSF selection of reviewers.  
[test.org](#)

+ Add Website

**Save** Cancel

Figure 11

**Area(s) of Expertise**

Select up to five items that best describe your area(s) of expertise.  
If your area of expertise is not listed, you may add your own by selecting "Other (Please specify)."

\* Area(s) of Expertise Add up to five \* Other (Please specify)

1. Other (Please specify) Marine Biology

+ Add Area of Expertise

Figure 12



### What do I do if I accidentally delete the verification email sent by NSF?

- Select the **“View/Edit My Profile”** option. (Refer to Step 1 in the [“View and Edit My NSF Account Profile Information”](#) job aid)
- Within the **Contact Information** tab on the **My Profile** page, click **“Pending Your Verification”** located to the right of the primary email address. (Figure 13)
- Select **“Click here to Resend the verification link email.”** (Figure 14)
- A new verification email will be sent to your pending primary email address (i.e., the updated email address entered in Step 2 in the [“View and Edit My NSF Account Profile Information”](#) job aid).

**Important Note:** NSF will send you a verification email. You must verify the updated email address within four hours or your account email address will revert back to your last verified email address.

**If the four hours have passed, the resend verification email option will not be available and you will need to restart the process by updating your email address again. (Refer to Step 2 in the “View and Edit My NSF Account Profile Information” job aid)**

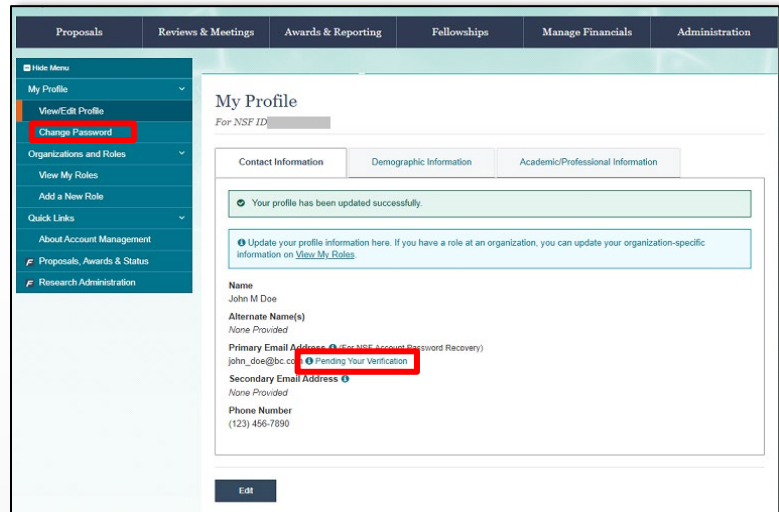


Figure 13

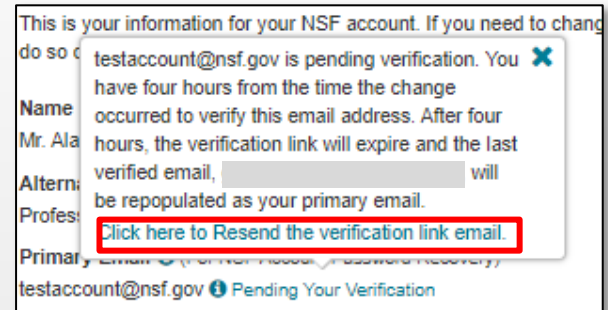


Figure 14



### How do I change my password?

- Select the “**View/Edit My Profile**” option. (Refer to Step 1 on page 11)
- Click “**Change Password**” located in the left navigation bar. (Figure 13)
- Update your password and click “**Change Password.**” (Figure 15)
- Once your password is successfully changed, you will receive a password change notification on the screen. (Figure 16)
- You have successfully changed your password!
- Click “**Continue to Research.gov**” to keep working. (Figure 16)

Change Password  
For Research.gov and FastLane

Enter your temporary password as received to change your password.

Enter your current password and then create a new password.

NSF ID

Current Password

New Password

Confirm Password

Your password needs to:

- Have at least 8, but no more than 20 characters
- Avoid using spaces
- Meet 3 of the 4 rules:
  - At least one lowercase letter
  - At least one capital letter
  - At least one number
  - At least one of the permitted special characters # & % ! @ ( )

Note: you cannot re-use your last 6 passwords

Change Password Cancel

Figure 15

Change Password  
For Research.gov and FastLane

Success - Password Changed

Your password has been successfully changed in Research.gov and FastLane.

In the future, if you need to change your password, click the "My Profile" link on the top right of the page and select "Change Password".

Continue to Research.gov Continue to FastLane

Note: Most FastLane functions can be reached directly from Research.gov, without the need to sign in again.

Figure 16



### Helpful Tip

Passwords are valid for 365 days before required renewal.



# Register a New Organization



Organizations must be registered with the National Science Foundation (NSF) to submit proposals in Research.gov or via Grants.gov. Before a new prime awardee organization can register with NSF, it must first be registered in the System for Award Management (SAM) at [SAM.gov](https://sam.gov), complete the required entity validation, and have a Unique Entity Identifier (UEI). Note that completion of the SAM registration process may take up to one month. Subrecipient organizations must also register with NSF after obtaining a SAM-issued UEI. However, subrecipient organizations do not need to complete the entity validation in SAM. Please check [SAM.gov](https://sam.gov) for information about any delays of SAM.gov registrations, validations and UEI issuance.

Follow the step-by-step process below to register a new organization with NSF.

## How do I register a new prime awardee organization with NSF?

- Open [Research.gov](https://research.gov)
- Click **“Sign In”** located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click **“Sign In.”**
- Click **“My Profile”** located at the top right of the screen.
- Click **“Add New Role”** from the left navigation bar.
- Click **“Add Organizational Role”** located in the **“Add and Manage Organizations”** box. (Figure 1).
  - **Note:** If an organization is new to NSF, you must start the process by setting yourself up as the Administrator for the new organization. You must have an NSF account to start this process. The system will automatically detect that the organization is new and will walk you through setting up the organization and Administrator role.
- Enter your organization’s Unique Entity Identifier (UEI) and click **“Search.”** If your organization is not already registered with NSF, a message will display to confirm that the organization is not found in NSF systems and you will be able to register the organization and become the first Administrator. (Figure 2)
  - If you need help registering in the System for Award Management (SAM), go to [SAM.gov](https://sam.gov).
  - Note that completion of the SAM registration process may take up to one month. Please check [SAM.gov](https://sam.gov) for information about any delays of SAM.gov registrations, validations and UEI issuance.

Figure 1

Figure 2



### Helpful Tip

If a new organization is registered with NSF without an Administrator, the first user to request a role will become the organization’s first Administrator.



### Continuation of steps to Register a prime awardee organization with NSF

- Enter your contact information for the Administrator role, add your organization's information, and then click **"Next."** (Figure 3)
- Notice the "Administrator" role is pre-selected. Click **"Next."** (Figure 4)
- Review your organization's information for accuracy and click **"Submit."** (Figure 5)
- The request to register your prime awardee organization with NSF will be forwarded via email to your organization's SAM points of contact for their information only. The SAM points of contact will not need to approve the request. (Figure 6)

The screenshot shows the 'Add Information' step of the registration process. The progress bar at the top indicates four steps: 1. Find Organization (checked), 2. Add Information (active), 3. Choose Role(s), and 4. Review. Below the progress bar, the title 'Add Information' is followed by a note: 'The contact information will be used for all communications when performing in approved roles for this organization'. A 'Required' section lists the following fields: 'Work Phone Number' (text input), 'Work Email' (dropdown menu with 'Select Work Email' option), 'Organization Short Name' (text input), 'Organization Type' (dropdown menu with 'Select Organization Type' option), 'Time Zone' (dropdown menu with 'Select Time Zone' option), 'Organization Phone Number' (text input), 'Organization Fax Number' (text input), and 'Organization Email' (text input). At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Next' (highlighted with a red box).

Figure 3

The screenshot shows the 'Choose Role(s)' step of the registration process. The progress bar at the top indicates four steps: 1. Find Organization (checked), 2. Add Information (checked), 3. Choose Role(s) (active), and 4. Review. Below the progress bar, the title 'Add a New Role to Add and Manage Organizations' is followed by the text 'You will be registered for the following role:'. Below this, there is a list of roles with 'Administrator (Manage Roles)' selected. At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Next' (highlighted with a red box).

Figure 4

The screenshot shows the 'Review' step of the registration process. The progress bar at the top indicates four steps: 1. Find Organization (checked), 2. Add Information (checked), 3. Choose Role(s) (checked), and 4. Review (active). Below the progress bar, the title 'Add a New Role to Add and Manage Organizations' is followed by the text 'Review'. Below this, the following information is displayed: 'Organization Name: National Science Foundation', 'SAM Legal Business Na: NATIONAL SCIENCE FOUNDATION', 'Role(s): Administrator', 'Work Email: test@associates.nsf.gov', and 'Work Phone Number: (123) 456-7890'. At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Submit' (highlighted with a red box).

Figure 5



### Helpful Tip

Once an organization is registered with NSF, any updates to organizational information must be made by an organization's Administrator in SAM.gov.

The screenshot shows the success message after the registration process. The title 'Add a New Role to Add and Manage Organizations' is followed by a yellow warning box: 'Only persons with the Authorized Organizational Representative (AOR) role can submit proposals to NSF on behalf of their organization. This role must be assigned to one or more persons in your organization before you can finalize a proposal submission. The AOR role is never assigned to any person by default. You can request the AOR role via the [Add a New Role](#) page.' Below this, a green success message states: 'Success - You have been assigned the Administrator Role. You can review your role on the [View My Roles](#) page.' Below the success message, there is a table with two columns: 'Organization Contact(s)' and 'Organization Contact Type'. The table contains one row: 'DOE, JANE' and 'SAM POC'. Below the table, there are two links: 'Continue to My Profile' and 'Add Additional Roles'.

Figure 6



## How does a subrecipient organization register with NSF?

Any subrecipient named in a proposal is also required to obtain a SAM.gov-issued UEI and register the organization with NSF. Subrecipient(s) named in the proposal, however, do not need to go through the full UEI registration in SAM.gov. Refer to the [Proposal & Award Policies & Procedures Guide](#) (PAPPG) Chapter I.G.2. Details are as follows:

- **Step 1: Subrecipient must obtain a SAM-issued UEI:**
  - A subrecipient without a UEI must go to [SAM.gov](#) and select the green Get Started button on the "Register Your Entity or Get a Unique Entity ID" section in the upper right side of the page. Please note, the information required for obtaining a UEI is minimal (organization's legal business name and address) and will be processed relatively quickly.
- **Step 2: Subrecipient must contact the NSF Help Desk to register a subrecipient organization with NSF:**
  - Once the subrecipient obtains the UEI through SAM.gov, the subrecipient must contact the NSF Help Desk at 1-800-381-1532 (7:00 AM - 9:00 PM ET; Monday - Friday except federal holidays) to register the organization with NSF. When the subrecipient contacts the NSF Help Desk, inform the technician that this is a subrecipient requiring subrecipient organization registration with NSF. Please do not attempt to register the subrecipient organization with NSF in Research.gov because the system will generate an error and will not permit the subrecipient registration. To expediate the process, subrecipients should provide the following information for its subrecipient organization:
    - Subrecipient UEI: Required
    - Subrecipient Organization Name: Required
    - Subrecipient Complete Address (Including City, State, and Zip): Required
    - Subrecipient Phone Number: Optional
    - Subrecipient POC: Optional
    - Email of Subrecipient Organization: Optional
- Once these two steps are complete, the subrecipient organization may be added to a proposal with the subrecipient UEI.



## Add a New Organizational Role





To work on National Science Foundation (NSF) proposal and award activities in Research.gov or via Grants.gov, a user must have an organization-approved role at an organization registered with NSF. To request a role from your organization, you must sign in to [Research.gov](https://www.research.gov) and select the “**My Profile**” link located on the top right of the screen. Select the “**Add a New Role**” option from the left navigation bar. After requesting a role, your organization’s Administrator will receive the request electronically to approve or disapprove it.

Figure 1

Figure 1 shows the four organizational role categories: Investigator, Organizational, Financial, and GRFP Official. Users should click the appropriate dark blue **Add Role** button (e.g., **Add Investigator or Authorized User Role** to request a PI role) to request the specified role and to proceed with the role wizard. Note that beneath each dark blue **Add Role** button, there is an information link (e.g., [PI/co-PI, Postdoctoral Fellow and Other Authorized User role details](#)) which provides additional information about the specific role. The table below outlines the role request options grouped by category.

If you need this organizational role(s)	To perform these functions	Select this “Add Role” Button
<ul style="list-style-type: none"> <li>Principal Investigator (PI)</li> <li>Co-Principal Investigator (co-PI)</li> <li>Proposed Postdoctoral Fellow</li> </ul>	<ul style="list-style-type: none"> <li>Prepare proposals</li> <li>Manage awards</li> </ul>	Add Investigator or Authorized User Role
<ul style="list-style-type: none"> <li>Administrator</li> <li>Sponsored Projects Officer (SPO)</li> <li>Authorized Organizational Representative (AOR)</li> <li>View Only</li> </ul>	<ul style="list-style-type: none"> <li>Add a new organization</li> <li>Approve/disapprove roles</li> <li>Assign user roles</li> <li>Add/remove users</li> </ul>	Add Organizational Role
<ul style="list-style-type: none"> <li>Awardee Preparer</li> <li>Awardee Certifier</li> <li>Awardee Financial Representative</li> </ul>	<ul style="list-style-type: none"> <li>Prepare and manage financials in Award Cash Management Service (ACM\$)</li> </ul>	Add Financial Role
<ul style="list-style-type: none"> <li>Graduate Research Fellowship Program (GRFP) Coordinating Official (CO)</li> <li>GRFP Alternate Coordinating Official (Alt. CO)</li> <li>GRFP Financial Official (FO)</li> </ul>	<ul style="list-style-type: none"> <li>Manage GRFP functions</li> </ul>	Add GRFP Official Role
<ul style="list-style-type: none"> <li>Other Authorized User (OAU)</li> </ul>	<ul style="list-style-type: none"> <li>Assist a PI with proposal preparation</li> </ul>	Add Investigator or Authorized User Role

### Important Notes:

- Reviewers do not need to request a role and should follow the [Provide Reviewer Profile Information](#) job aid for detailed instructions to complete their Reviewer Profile.
- Additional [instructional materials](#) are available for GRFP Officials.



## Role Request Wizard Steps

The four-step wizard process is the same for all organizational-approved roles. Proposed Postdoctoral Fellows follow a two-step wizard process as outlined in the [Add a New Organizational Role - Proposed Postdoctoral Fellow](#) job aid.

### Step 1: Find Organization

- Enter your organization's Unique Entity Identifier (UEI) and click **"Search"** (Figure 2). If you already have an organization-approved role at NSF, you can use the drop-down menu to select the UEI associated with your NSF-registered organization. This step is the same regardless of whether your organization is a prime or subrecipient.
- Verify the correct organization is displayed in the results section and click **"Next."** (Figure 2)

**Note:** For more information about System for Award Management (SAM) UEIs, go to [SAM.gov](#), or contact your Sponsored Projects Office (SPO).

- If your organization is not registered in SAM, go to [SAM.gov](#). Note that completion of the SAM registration process may take up to one month. Please check [SAM.gov](#) for information about any delays of SAM.gov registrations, validations and UEI issuance.

Figure 2

### Step 2: Add Information

- Enter your work phone number. Use the drop-down menu to select a current work email address or add a new work email address. Then click **"Next."** (Figure 3)

**Note:** If you are requesting a *Principal Investigator* or *Proposed Postdoctoral Fellow* role, you will need to enter additional data. Please see the following job aids for detailed instructions: [Add a New Organization-Approved Role – Principal Investigator](#) or [Add a New Organizational Role – Proposed Postdoctoral Fellow](#). If you are requesting another role at an organization where you already have a role, Step 2 of the Role Request Wizard will be pre-populated with your work phone number and email.

Figure 3



### Helpful Tips

Each NSF account requires a primary email address and a work email address.

- Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., a Gmail address), even if you change organizations.
- Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



### Step 3: Choose Organizational Role(s)

- Select a role(s) and click “Next”. (Figure 4)

**Note:** Depending on the selected organizational role, please be aware that some corresponding organizational roles will also be automatically added. For example, if you select the Administrator role, the Sponsored Projects Officer role and the View Only role will automatically be added to your profile.

Figure 4

### Step 4: Review and Submit

- Review your information for accuracy and click “Submit.” (Figure 5)

Figure 5

### Success

- Your role request(s) are sent to the Administrators in the Organization Contacts list for review and approval (Figure 6).
- You have successfully submitted your organizational role request(s)!

Figure 6



### Helpful Tips

An email will be sent to the work email address you used to request an organizational role to inform you if your role is approved or disapproved by your organization. You should reach out to the Administrator listed as one of the organization contacts located on View My Roles page if you need to follow up on your role request.



## **Add a New Organization-Approved Role - Principal Investigator PI/Co-PI**



To work on National Science Foundation (NSF) proposal and award activities in Research.gov or via Grants.gov, a Principal Investigator (PI)/co-Principal Investigator (co-PI) must have an organization-approved Investigator role. After requesting a role, your organization's Administrator will receive the request electronically to approve or disapprove it. To request an organization-approved role, you must sign in to [Research.gov](https://www.research.gov) and select the **"My Profile"** link located on the top right of the screen. Select the **"Add a New Role"** option from the left navigation bar.

## Access the Add New a Role page

- To request an organization-approved Investigator role, click the blue **"Add Investigator or Authorized User Role"** button located in the "Prepare Proposals and Manage Awards" box. (Figure 1)
- Select **"Principal Investigator (PI) or co-Principal Investigator (co-PI)"**, click **"Submit"** (Figure 2) and a four-step role request wizard will display. (Figure 3)

Figure 1

Figure 2

## Four-Step Role Wizard

### Step 1: Find Organization

- Enter the organization's Unique Entity Identifier (UEI) and click **"Search"** (Figure 3). If you already have an organization-approved role at NSF, select the UEI associated with your existing organization from the drop-down menu. This step is the same regardless of whether your organization is a prime or subrecipient.
- Verify the correct organization is displayed in the results section and click **"Next."**

**Note:** For more information about SAM UEIs, go to [SAM.gov](https://sam.gov), or contact your Sponsored Projects Office (SPO).

Figure 3



## Step 2: Add Information

- Complete the required fields denoted by a red asterisk (\*) and click **“Next.”** (Figure 4)

**Important Note:** Your Demographic Information will not be shared with the listed Organizational Contacts while reviewing and approving your role request.

## Step 3: Choose Role(s)

- The “Principal Investigator” role is pre-selected. Click **“Next.”** (Figure 5)

## Step 4: Review and Submit

- Review your information for accuracy and click **“Submit.”** (Figure 6)
- If you need to update your PI role request information, select the **“Previous”** button to return to the previous screens.

## Success

- Your role request is sent to the listed Organization Contacts for review and approval. (Figure 7)
- You have successfully submitted your organizational role request!



### Helpful Tips

- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Academic/Professional Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- The Demographic Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Demographic Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- By default, the latest PI role will be set to primary.

Figure 4

Figure 5

Figure 6

Organization Contact(s)	Organization Contact Type
Smith, John	Administrator
John Doe	Administrator
Carey, Mariah	SAM POC
Joffe, Angelina	SAM POC
Doe, Jane	SAM POC

Figure 7



## Add a New Organizational Role – Proposed Postdoctoral Fellow





To work on National Science Foundation (NSF) proposal and award activities in Research.gov or via Grants.gov, you must have an organizational Investigator role even if you are working independently and are not affiliated with an organization. To request an organizational Investigator role, you must sign in to [Research.gov](https://www.research.gov) and select the **“My Profile”** link located on the top right of the screen. Then select the **“Add a New Role”** option from the left navigation bar.

Registering for a Proposed Postdoctoral Fellow organizational role creates an organization in Research.gov, but you do not need to register the organization with NSF. You will become the Administrator of the newly created organization; however, other users cannot request organizational roles or affiliate themselves with the organization. You do not need to register the newly created organization with [SAM.gov](https://www.sam.gov) or obtain a UEI.

### Access the Add a New Role page

- To request an organizational Investigator role, click the blue **“Add Investigator or Authorized User Role”** button located in the “Prepare Proposals and Manage Awards.” (Figure 1)
- Select **“Proposed Postdoctoral Fellow”**, click **“Submit”** (Figure 2) and a two-step role request wizard will display. (Figure 3)

### Two-Step Process

#### Step 1: Add Information

- Input data into all required fields that have a red asterisk (\*)
- Click **“Next.”** (Figure 3)

Figure 1



### Helpful Tips

- The third option in the “Select Role Type” modal box (Figure 2) is disabled if you already have an organizational Proposed Postdoctoral Fellow role. To view your current organizational Proposed Postdoctoral Fellow role information, click on **“View My Roles”** and refer to the Active Roles table.
- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Academic/Professional Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- The Demographic Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Demographic Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- By default, the latest PI role will be set to primary.

Figure 2





Add a Proposed Postdoctoral Fellow Role

\* Required

Your Contact Details

\* Work Phone Number  
(111) 111-1111

\* Work Email  
John\_doe@ahc.com

Your Degree Information

The degree information entered here will be used to populate the printed Cover Sheet of your proposals to NSF.

\* Highest Degree Type  
AS - Associate in Science

\* Degree Year  
2005

Your Work Address

\* Country  
United States

\* Time Zone  
Pacific/Pago\_Pago (GMT-11:00)

\* Street Address  
123 Test St

Street Address (Line 2)  
Suite 100

\* City  
Alexandria

\* State  
Vermont

\* Postal Code  
12345

Your Demographic Information

NSF asks for demographic data relating to gender, ethnicity/race and disability to gauge whether our programs and other opportunities in science and technology are fairly reaching and benefiting everyone regardless of demographic category, and to ensure that those in under-represented groups have the same knowledge of and access to programs, meetings, vacancies, and other research and educational opportunities as everyone else. For more information, read the [Privacy Act Statement](#).

\* Gender (Please select one)  
☐ Male  
☐ Female  
☒ Unspecified, or another gender identity  
☐ Do not wish to provide

\* Ethnicity (Please select one)  
☒ Hispanic or Latino  
☐ Not Hispanic or Latino  
☐ Do not wish to provide

\* Race (Please select all that apply)  
 Race Definitions  
☐ American Indian or Alaska Native  
☒ Asian  
☒ Black or African American  
☐ Native Hawaiian or Other Pacific Islander  
☐ White  
☐ Other (Please specify)  
☐ Do not wish to provide

\* Do you have a disability? (Please select one)  
 What is considered a disability?  
☒ Yes  
☐ No  
☐ Do not wish to provide

Cancel Next

Figure 3

## Step 2: Review

- Review your information for accuracy and click **“Submit.”** (Figure 4)
- If you need to update your role request information, select the **“Previous”** button to return to the previous screen.

Add a Proposed Postdoctoral Fellow Role

Review your information for accuracy:

Organization Name: Doc, John  
Role: Proposed Postdoctoral Fellow

Your Contact Details

Work Phone Number: (111) 111-1111  
Work Email: John\_doe@ahc.com

Your Degree Information

Highest Degree Type: AS - Associate in Science  
Degree Year: 2005

Your Work Address

Country: United States  
Time Zone: Pacific/Pago\_Pago  
Street Address: 123 Test St  
Street Address (Line 2): Suite 100  
City: Alexandria  
State: Vermont  
Postal Code: 12345

Your Demographic Information

Gender: Unspecified, or another gender identity  
Race: Asian, Black or African American  
Ethnicity: Hispanic or Latino  
Do you have a disability?: Yes

Cancel Previous Submit

Figure 4

## Step 3: Confirmation

- View the success message to confirm you have successfully added the Proposed Postdoctoral Fellow organizational role. (Figure 5)

Add a Proposed Postdoctoral Fellow Role

You have successfully added the Proposed Postdoctoral Fellow role. Please note that it can take up to 30 minutes for you to be able to prepare postdoctoral fellowship proposals.

[Prepare and Submit Proposals >](#)  
[Continue to My Profile >](#)  
[Add Additional Roles >](#)

Figure 5



## View My Organizational Roles – Requested Role(s)



The View My Roles page shows the roles you have requested which are pending approval or disapproval from your organization's Administrator as well as your existing approved roles. You may view Organization Contact(s) and edit your organization contact information by following the step-by-step process below.

Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. Please see the [“View My Reviewer/Meeting Participant Information”](#) job aid for additional reviewer information.

## Access the View My Roles page

- Open [Research.gov](https://research.gov)
- Click **“Sign In”** located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click **“Sign In.”**
- Click **“My Profile”** located at the top right of the screen.
- Click **“View My Roles”** from the left navigation bar.

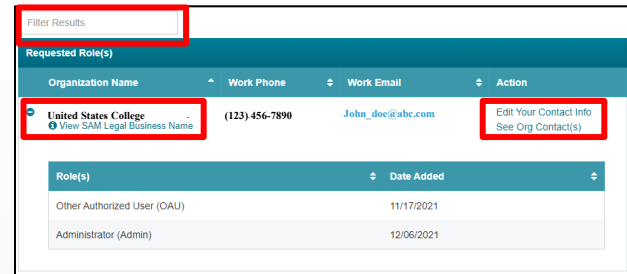


Figure 1

## How do I change organization contact information for a PI or co-PI role?

- Locate the organization and click **“Edit Your Contact Info”** in the “Action” column located on the right side of Requested Role(s) table. (Figure 1)
- Users who have a PI or co-PI role will see the screen depicted in Figure 2 and can edit their contact details, degree information, and work address. Then click **“Save.”**
- Time Zone is determined by initial registration or role assignment. If this information is longer correct, contact the NSF Help Desk at 1 (800) 381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov)

Figure 2



### Helpful Tips

- The Requested Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
  - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
  - Sort data in ascending or descending order by clicking the arrows located next to the column names.
  - Expand and collapse the organization name to display and hide roles.



### How do I change organization contact information for a non-PI or co-PI role?

- Locate the organization and click **“Edit Your Contact Info”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- Users who have non-PI or co-PI roles will see the screen depicted in Figure 3 and can edit their work phone number and work email address. Then click **“Save.”**

Edit Your Contact Information

Your information for United States College.

NSF account information is located on [My Profile](#).

\* Required

\* Work Phone Number (123) 456-7890

\* Work Email John.doe@abc.com

Save Cancel

Figure 3

### Who do I contact at my organization for role request questions?

- Locate the organization and click **“See Org Contact(s)”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 4)

Organization Contact(s)

Show 5

showing 1-5 of 34 < Prev 1 2 3 4 5 Next >

Organization Contact(s)	Organization Contact Type
Debra Callaway	Administrator
Jasmine Campbell	Administrator
Lisa Cantore	Administrator
Nicky Choi	Administrator
Autumn Eck	Administrator

showing 1-5 of 34 < Prev 1 2 3 4 5 Next >

Figure 4

### Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figure 2 on previous page & Figure 3)
  - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., a Gmail address), even if you change organizations.
  - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



## View My Organizational Roles – Active Role(s)



The View My Roles page shows the roles you have requested which are pending approval or disapproval from your organization's Administrator as well as your existing approved roles. You may view Organization Contact(s) and edit your organization contact information by following the step-by-step process below. You may set your Primary Organization designation if you have a Principal Investigator role at an organization or are a Proposed Postdoctoral Fellow.

Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. Please see the ["View My Reviewer/Meeting Participant Information"](#) job aid for additional reviewer information.

## Access the View My Roles page

- Open [Research.gov](#)
- Click **"Sign In"** located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click **"Sign In."**
- Click **"My Profile"** located at the top right of the screen.
- Click **"View My Roles"** from the left navigation bar.

Organization Name	Work Phone	Work Email	Action
United States College View SAM Legal Business Name ✓(PI Primary Organization)	(333) 333-3333	John_doe@abc.com	Edit Your Contact Info See Org Contact(s)

Role(s)	Date Added
Principal Investigator / co-Principal Investigator (PI)	02/09/2023

Figure 1

## How do I change organization contact information for a PI or co-PI role?

- Locate the organization and click **"Edit"** in the "Action" column located on the right side of Active Role(s) table. (Figure 1)
- Users who have a PI or co-PI role will see the screen depicted in Figure 2 and can edit their contact details, degree information, and work address. Then click **"Save"**.
- Time Zone is determined by initial registration or role assignment. If this information is longer correct, contact the NSF Help Desk at 1 (800) 381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov).

Figure 2



## Helpful Tips

- The Requested Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
  - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
  - Sort data in ascending or descending order by clicking the arrows located next to the column names.
  - Expand and collapse the organization name to display and hide roles.



### How do I change organization contact information for a Proposed Postdoctoral Fellow role?

- Locate the organization and click **“Edit Your Contact Info”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- Users who have a Proposed Postdoctoral Fellow role will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work address. Then click **“Save.”**
- Time Zone is determined by initial registration or role assignment. If this information is longer correct, contact the NSF Help Desk at 1 (800) 381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov).

### How do I change organization contact information for all other roles?

- Locate the organization and click **“Edit Your Contact Info”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- Users who have non-PI, co-PI or Proposed Postdoctoral Fellow roles will see the screen depicted in Figure 4 and can edit their work phone number and work email address. Then click **“Save”**.

### Who do I contact at my organization for role request questions?

- Locate the organization and click **“See Org Contact(s)”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 5)



#### Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figures 2 and 3)
  - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., a Gmail address), even if you change organizations.
  - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.

Figure 3

Figure 4

Organization Contact(s)	Organization Contact Type
Doe, John P.	Administrator
Doe, Jane	Administrator
Apple, Alice	Administrator
Pear, Priscilla	Administrator
Orange, Oliver	Administrator

Figure 5



## How do I set an organization as my Primary Organization for proposal submissions?

- **Prerequisites:** You must have either an organization-approved Principal Investigator (PI) role or a Proposed Postdoctoral Fellow role before you can designate a Primary Organization.
  - If you don't have an organization-approved Principal Investigator role and would like to request one, refer to the [“Add a New Organization-Approved Role - Principal Investigator PI/Co-PI”](#) job aid.
  - If you don't have a Proposal Postdoctoral Fellow role and would like to request one, refer to the [“Add a New Organizational Role – Proposed Postdoctoral Fellow”](#) job aid.
- Open the **“View My Roles”** page and locate the Active Role(s) table. (Figure 6)
- Locate the organization where you have an approved PI role that you would like to set as your Primary Organization. (Figure 6)
- If your roles at the organization are not already expanded, click on the plus sign next to the organization name to expand the row. (Figure 6)
- Locate the Principal Investigator role. (Figure 6)
- Select the **“Primary Organization”** check box located to the right of the Date Added field. (Figure 6)
- Notice the green check mark and “PI Primary Organization” label under the organization name. (Figure 6)
- By default, the Organization associated with the latest PI role added to your profile (including a Proposed Postdoctoral Fellow role) will become the Primary Organization.

Filter Results			
Active Role(s)			
Organization Name	Work Phone	Work Email	Action
United States College View SAM Legal Business Name ✓(PI Primary Organization)	(999) 999-9999	John_doe@abc.com	Edit Your Contact Info See Org Contact(s)
Role(s)		Date Added	
Other Authorized User (OAU)		11/29/2021	
Principal Investigator / co-Principal Investigator (PI)		11/29/2021	<input checked="" type="checkbox"/> Primary Organization
Administrator (Admin)		11/29/2021	

Figure 6



### Helpful Tips

- You can only have one Primary Organization.
- Only PIs need to select a Primary Organization.
- By default, the Organization associated with the latest PI role added to your profile (including a Proposed Postdoctoral Fellow role) will become the Primary Organization.





## View My Users – Administrator Dashboard



The View My Users page is a dashboard for the organization Administrator to view the organization’s pending role requests and manage user tables. Via this dashboard, the Administrator is able to approve or disapprove role requests, add or remove current user roles, add current NSF users to the organization, invite users to create NSF accounts, and invite current users to update their profile information. Reviewers are not included on the View My Users page dashboard even if they have an organizational affiliation to the organization. Only individuals with organization-approved roles are included on the View My Users page dashboard.

## Access the View My Users page

- Open [Research.gov](https://www.research.gov)
- Click “Sign In” located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click “Sign In.”
- Click “My Profile” located at the top right of the screen.
- Click “View My Users” from the left navigation bar.

## How do I approve or disapprove a role request from a user?

- View the “Pending Role Requests” table. (Figure 1)
- For each user role request, click “Approve” to accept a user’s request or “Disapprove” to reject a user’s request. (Figure 1)
- Approved role requests will now appear in the “Manage User Roles” table. (Figure 2)

## How do I add or remove user roles?

- View the “Manage User Roles” table. (Figure 2)
- Click “Manage Roles” located in the Action column on the right side of the table. (Figure 2)
- Select the appropriate role(s) to assign or remove from the user and click “Save.” (Figure 3)
  - **Caution:** Deselecting all roles for a user will remove the user from the organization. (Figure 3)
  - If another user has the Coordinating Official (CO) role, the system will display the current CO’s name. (Figure 3)
    - **Note:** There can only be one CO at an organization, and a CO cannot be removed from the organization unless the role is reassigned to another user.
  - If a user has not entered the required Principal Investigator Degree Information, work email and work phone number for the specified organization, an "Info Needed" icon will be displayed next to their name and PI role on the user's View My Roles page and also on the Administrator's View My Users page.

The user must input and save the required information by clicking on the “Edit Your Contact Info” link located in the Active Roles table on the View My Roles page.

View My Users

Welcome to the **View My Users** page. Here you can:

- Approve pending role requests
- Manage existing user roles in your organization
- Add new users to your organization

For help and more information go to the [About Account Management](#) page

Filter Results

Name	Role	Organization Name	Work Email	Date Requested	Action
John Doe	Sponsored Projects Officer	United States University	John_doe@abc.com	01/22/2018	Approve   Disapprove

Figure 1

Manage User Roles

Add User

Name	Organization Name	Work Phone	Work Email	Action
John Doe	United States College	555-555-5555	John_doe@abc.com	Manage Roles   Remove User

Role(s)	Date Added
Principal Investigator / co-Principal Investigator (PI)	01/09/2018

Figure 2

Roles

Roles for John Doe at United States College

Prepare Proposals and Manage Awards

☐ Principal Investigator (PI/co-PI)

☐ Other Authorized User (OAU)

Manage Organizations

☐ Administrator (Admin)

☐ Authorized Organizational Representative (AOR)

☐ Sponsored Projects Officer (SPO)

☒ View Only

Manage Financials in Award Cash Management Service (ACMS)

☐ Awardee Preparer

☒ Awardee Certifier

☒ Awardee Financial Representative

Graduate Research Fellowship Program (GRFP) Official

☐ Coordinating Official (CO) [currently John Doe]

☐ Alternate Coordinating Official (Alt. CO)

☐ Financial Official (FO)

Save Cancel

Figure 3

Manage User Roles

Add User

Name	Organization Name	Work Phone	Work Email	Action
John Doe	United States College		John_doe@abc.com	Manage Roles   Remove User

Role(s)	Date Added
Principal Investigator / co-Principal Investigator (PI)	01/18/2018

Figure 4



## How do I add an existing NSF user as a new user at my organization?

- View the “**Manage User Roles**” table. (Figure 5)
- Click “**Add User**.” (Figure 5)
- Enter an NSF ID or email address and click “**Search**.” (Figure 6)
- Ensure the intended user name appears.
- If you are an Administrator for multiple organizations, select an organization from the drop-down menu. (Figure 7)
- Click “**Continue**.” (Figure 7)
- Select the appropriate role(s) to assign to the user. (Figure 8)
  - **Note:** If the user already has pre-selected roles, this means the user has already been added to your organization. In this case, you may edit the user’s roles and click “**Add User**.” (Figure 8)
  - If a user does not have the required Principal Investigator Degree Information associated to their NSF account and/or does not have a work email address and a work phone number associated with the organization, an “Info Needed” icon will appear next their name and PI role. In addition, this icon will display on the user’s View My Roles page. The user must input and save the required information by clicking on the “Edit Your Contact Info” link located in Active Roles table on the View my Roles page.
  - **Caution:** Deselecting all roles for a particular user will remove the user from the organization. (Figure 8)
  - If another user has the Coordinating Official (CO) role, the system will display that current CO’s name. (Figure 8)

Name	Organization Name	Work Phone	Work Email	Action
	United States College			Invite to Update Profile
Role(s)	Date Added			
Not Onboarded				

Figure 5

Step 1 of 2: Search for User

NSF ID:  OR Email:

**Search** Cancel

Figure 6

Step 1 of 2: Search for User

NSF ID:  OR Email:

**Search**

Name	NSF ID	Email
John Doe	C.Claude2233	111111111 c*****@*****.com

Select Organization:

**Continue** Cancel

Figure 7

Step 2 of 2: Roles for John Doe at United States College

**Prepare Proposals and Manage Awards**

☐ Principal Investigator (PI/co-PI) **☒ Other Authorized User (OAU)**

**Manage Organizations**

☐ Administrator (Admin) **☒ Authorized Organizational Representative (AOR)**  
☒ Sponsored Projects Officer (SPO) ☐ View Only

**Manage Financials in Award Cash Management Service (ACMS)**

☒ Awardee Preparer ☒ Awardee Certifier ☒ Awardee Financial Representative

**Graduate Research Fellowship Program (GRFP) Official**

**☒ Coordinating Official (CO)** ☐ Alternate Coordinating Official (Alt. CO) ☐ Financial Official (FO)

**Add User** Cancel

Figure 8



### Helpful Tip

To add a user to an organization or to add a roles to a user, the user must have an updated profile. A user can only update their profile if they have successfully migrated their account and updated their primary email address and phone number.



## How do I invite a user at my organization to update their profile so I can add/remove their roles?

- Locate the “**Manage User Roles**” table. (Figure 9)
- Click “**Invite to Update Profile**” located in the Action column. (Figure 9)
- An email will be sent to the user informing them to update their profile.

Manage User Roles					Add User
Name	Organization Name	Work Phone	Work Email	Action	
United States College				Invite to Update Profile	
Role(s)		Date Added			
Not Onboarded					

Figure 9

## How do I invite a staff member at my organization who does not have an NSF account to register for an NSF account so that I may add them as a user on my organization's dashboard?

- Locate the “**Manage User Roles**” table. (Figure 9)
- Click “**Add User**.” (Figure 9)
- Enter an email address and click “**Search**.” (Figure 10)
- Ensure the correct email address appears. (Figure 10)
  - If you're an Administrator at multiple organizations, select an organization to invite the user. (Figure 10)
- Click “**Invite to Register**.” (Figure 10)

Add User

Step 1 of 2: Search for User

NSF ID  OR Email

Please check the email address entered. The email is either invalid or is not registered with NSF. You may retry the search or invite the user to register with NSF via email using the 'Invite to Register' button below.

Select Organization

Select an organization to invite the user to join

Figure 10

## How do I remove a user from my organization?

- Locate the “**Manage User Roles**” table. (Figures 11 and 12)
- Click “**Remove User**” located in the Action column. (Figure 11 shows a user who has migrated to the account management system and Figure 12 shows a user who has not migrated to the account management system)

A user cannot be removed if they are the last or sole Administrator.

- A user cannot be removed if they are the current Coordinating Official (CO). This CO role must be assigned to another user before removing the user.
  - Successfully removing the user will remove the user from the organization but not from NSF's system.
  - Removing a user from the organization does not in any way impact the user's NSF account or that user's ability to become affiliated with any other organization.
- Click “**Remove User**”. (Figure 13)

Manage User Roles					Add User
Name	Organization Name	Work Phone	Work Email	Action	
John Doe	United States College	555-555-5555	John_doe@abc.com	Manage Role Remove User	
Role(s)		Date Added			
Principal Investigator / co-Principal Investigator (PI)		01/09/2018			

Figure 11

Manage User Roles					Add User
Name	Organization Name	Work Phone	Work Email	Action	
John Doe	United States College	(111) 222-2222	John_doe@abc.com	Invite to Update Profile Remove User	
Role(s)		Date Added			
Not Onboarded					

Figure 12

Remove User

Are you sure you want to remove John Doe from United States College

Figure 13



### Helpful Tip

Users must have an updated profile in order to be added to an organization and to be assigned roles. A user can only update their profile if they have successfully migrated their account and verified their primary email address and phone number.



# Migrate Your Existing NSF Account



To migrate your existing NSF account to NSF's current account management system, you must verify your account's primary email address and phone number. If you created your NSF account before 2018 and your email address is associated with more than one NSF account, you will be prompted to verify information. Depending on the information on file, you may be required to contact the NSF IT Help Desk for assistance.

### How will the system prompt me to verify my information so that my account can be migrated?

- You will receive a Verify Your Information pop-up. After you have read it, click **"Next."** (Figure 1)
- Select an email address, enter your 10-digit phone number, and click **"Next."** (Figure 2)
- Note the information that has been saved as your account's primary email address and phone number. (Figure 3)
- Click **"Go to View My Roles"** and you will be directed to the View My Roles page to view current active roles for your organization(s). (Figure 3)

#### Notes:

- Demographic information that had been entered in FastLane will migrate to Research.gov along with the rest of your account and profile information as part of the migration process
- Upon completing the verification process, you will see a green success message at the top of the screen. To View/Edit your account and demographic information if you have a PI role, click the **My Profile** link in the success message. (Figure 3)



#### Helpful Tip

For instructions on how to make changes to your account profile information after your existing NSF account has been migrated to NSF's new account management system, please refer to the [View and Edit My NSF Account Profile Information](#) job aid.

Figure 1

Figure 2

Figure 3



## What happens when the system prompts me to verify my information but tells me I have multiple accounts that need to be reconciled?

- You will receive a Verify Your Information pop-up. After reading, click **“Next.”** (Figure 1)
- The “Multiple Accounts Found” pop-up informs you that your email address(es) is associated with more than one NSF ID. (Figure 4)
- Click **“Go To My Desktop.”** (Figure 4)
- Important Note:** Please be aware that the system will allow you to access Research.gov functionality for a grace period of 30 days.

Multiple Accounts Found

Your account email address(es) are associated with more than one NSF ID. NSF users should only have one NSF ID account per the NSF Proposal & Award Policies & Procedures Guide (PAPPG).

You may continue work on proposals and awards, however, NSF has logged this discrepancy and will contact you to help reconcile your multiple accounts. Please be aware that these accounts must be reconciled, but there will be a grace period before your system access will cease.

If you have questions, please contact the NSF Help Desk at 1-800-381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov).

Go To My Desktop

Figure 4

## My grace period has expired. What do I do?

- You will receive a Verify Your Information pop-up. After reading click **“Next.”** (Figure 1)
- The “Multiple Accounts Found” pop-up informs you that an update to your account is required in order to restore service. (Figure 5)
- This pop-up will appear each time you sign in until you contact the NSF IT Help Desk to reinstate your access to NSF systems. (Figure 5)
- Click **“Close.”** (Figure 5)

Multiple Accounts Found

An information update to your account is required in order to restore service. Please contact IT Help Central 1-800-381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov).

Please contact the HelpDesk.

Your account email(s) are associated with more than one NSF ID. NSF users should only have one NSF ID account per NSF Proposal & Award Policies & Procedures Guide (PAPPG).

If you have questions, please contact the NSF Help Desk at 1-800-381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov).

Close

Figure 5

## The system is telling me that my email address is not in the correct format. What do I do?

- You will receive a Verify Your Information pop-up. After you have read it, click **“Next.”** (Figure 1)
- Notice the “Account Verification Failure” pop-up informing you that your email address(es) is in an invalid format. (Figure 6)
- You must contact the NSF IT Help Desk to address this issue. (Figure 6)
- Click **“Close.”** (Figure 6)

Account Verification Failure

We are unable to complete the account verification process. Your existing account does not have an associated email address, or the email address is not in the correct format. Please contact the NSF IT Help Desk at 1-800-381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov).

Close

Figure 6



# Reviewer Job Aids





## Provide Reviewer Profile Information



For meetings created after March 24, 2023, NSF requires all reviewers and participants in panels, site visits, advisory committees, subcommittees, and committees of visitors to have an NSF account in Research.gov and complete a one-time process to provide their Reviewer Profile information. This must be done before meeting registration can be completed in the FastLane Travel & Reimbursement System.

### Submit Invitation Code

- If you do not already have an NSF account in Research.gov, please navigate to the [“Register for a New NSF Account”](#) job aid.
- After signing into Research.gov, you will see a **“Reviews & Meetings”** tile on the Research.gov homepage. (Figure 1)
- Click the **“Provide Reviewer Profile Information”** link to begin the one-time process to provide your reviewer information. Any information you previously supplied to NSF will be pre-populated during the process. Note that after you complete the one-time process and sign back into Research.gov, the Provide Reviewer Profile Information link will no longer be displayed. (Figure 2)
- Enter the invitation code provided in an email to you from NSF (noreply@nsf.gov) with the subject “NSF - Action Needed: Provide Reviewer Profile Information.” If you cannot locate the email, please contact the NSF Help Desk at 1-800-381-1532 to have it re-sent. (Figure 3)
- Click **“Submit.”**
- Important Note:** You will only receive an email with an invitation code if you are invited by an NSF staff member to participate in a panel, site visit, advisory committee, subcommittee, or committee of visitors meeting. If you believe you should have received an email with an invitation code or for additional assistance, contact the NSF Help Desk at 1-800-381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov).

### Verify Your Email Address

- You may be prompted to verify your email address after submitting your invitation code by entering a one-time password that will be sent to your email address. (Figure 4)
- Enter the one-time password provided in an email to you from NSF (noreplyadmin@nsf.gov) with the subject “NSF Email Verification - Your One-Time Password.” If you cannot locate the email, click the “generate a new one” link on the screen or contact the NSF Help Desk at 1-800-381-1532 for assistance.
- Click **“Continue.”**

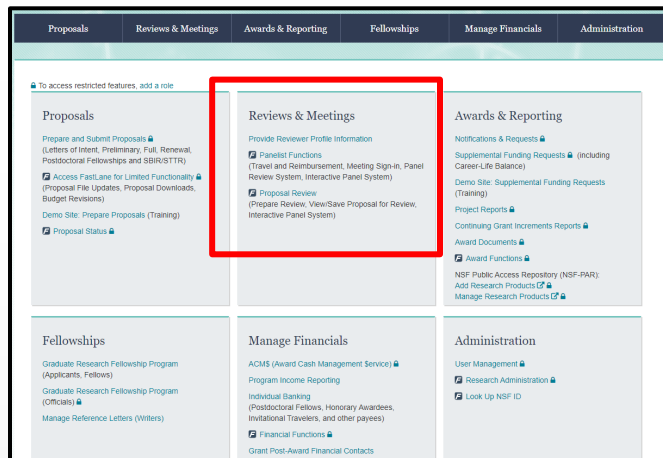


Figure 1



Figure 2

### Provide Reviewer Profile Information

Linking Reviewer Information is only for those users who have received notice from NSF through email to provide their information in Research.gov.

NSF now requires all meeting participants to manage profile information in Research.gov. You will not be able to participate until you have completed this one-time process. You may need to provide additional information such as organizations and demographics.

Invitation Code (10 characters, e.g., 123A567B8C) [Where is my code?](#)

[Back to My Desktop](#)

Figure 3

### Verify Your Email Address

You will need to verify your email address to continue. A one-time password has been sent to \*\*\*\*\*T@gmail.com and will expire in 10 minutes. If you can't find it or it has expired, you can [generate a new one](#) or contact the NSF Help Desk at 1 (800) 381-1532 or [Rgov@nsf.gov](mailto:Rgov@nsf.gov).

One-Time Password (6 digits)

Note: For security purposes, you will receive two emails, one to your Research.gov account email and one to the email listed above.

Figure 4



After submitting your invitation code, you will be navigated to a five-step wizard to enter reviewer profile information including organizational affiliations, demographic information, academic and professional references, and preferred contact information for reviewer/meeting activities. All information can be updated at any time by accessing “My Profile” in Research.gov.

### Step 1: Organizational Affiliation(s)

- Indicate if you have been affiliated with any organizations in the past 12 months. (Figure 5)
- If you select “No”, click “Next” to continue.
- If you select “Yes”, you will need to add your organizational affiliations.

**Important Note:** If you already have an organization-approved role (e.g., PI role) at NSF, then “Yes” will be automatically selected by default and the “No” option will be disabled. (Figure 8)

### Adding Organization(s)

- When “Yes” is selected, a field will appear for you to add your organizational affiliation(s). (Figure 6)
- Search for your organization by typing the name of the organization in the field. If the organization is registered in SAM.gov, then it will appear in the list along with the organization’s SAM.gov-issued Unique Entity ID (UEI) and address. Select the organization from the list. (Figure 6)
- If your organization is not in the system, you can add the organization by selecting the “Other (Please specify)” option. (Figure 7)
- If you have been affiliated with more than one organization in the past 12 months, click “Add Additional Organization” and repeat the process to add the other organizational affiliations. (Figure 7)
- If necessary, you can delete an organization you entered using the trash can icon. (Figure 7)
- Click “Next” to continue.

**Important Note:** If you already have an organization-approved role (e.g., PI role) at NSF, then the organization(s) affiliated with your role(s) will be listed. You cannot delete these organizations from the list. However, you can indicate if you have not been affiliated in the past 12 months with the organization(s) by clicking the check box next to it. (Figure 8)

### Provide Reviewer Profile Information

1. Organizational Affiliation(s)

2. Affiliation Details

3. Demographic Information

#### Organizational Affiliation(s) in the Past 12 Months

\* Required

Organizational affiliations are used to manage reviewer selection.

\* In the past 12 months, have you been affiliated with an organization?

- ☐ No. I have not been affiliated with an organization in the past 12 months
- ☐ Yes. I am currently affiliated or have been affiliated with an organization in the past 12 months

Figure 5

\* In the past 12 months, have you been affiliated with an organization?

- ☐ No. I have not been affiliated with an organization in the past 12 months
- ☒ Yes. I am currently affiliated or have been affiliated with an organization in the past 12 months

Search for an organization below by name. Matching results will be returned along with the organization's SAM.gov unique entity ID (UEI). If your organization is not listed, you may add your own by selecting "Other (Please specify)."

\* Organization(s) Search by Name

1.

TEST University  
UEI: XXXXXXXXXXXX  
123 Alpha Street, Austin, TX 12345, US

Figure 6

\* Organization(s) Search by Name

1.   
UEI: XXXXXXXXXXXX  
123 Alpha Street, Austin, TX 12345, US

2.

+ Add Additional Organization

Figure 7



### Helpful Tips

- Unique Entity Identifiers (UEI) are issued by the System for Award Management (SAM). Please refer to [SAM.gov](https://sam.gov). Note that completion of the SAM registration process may take up to one month.

\* In the past 12 months, have you been affiliated with an organization?

- ☐ No. I have not been affiliated with an organization in the past 12 months
- ☒ Yes. I am currently affiliated or have been affiliated with an organization in the past 12 months

Search for an organization below by name. Matching results will be returned along with the organization's SAM.gov unique entity ID (UEI). If your organization is not listed, you may add your own by selecting "Other (Please specify)."

\* Organization(s) Search by Name

1.   
UEI: XXXXXXXXXXXX  
123 Alpha Street, Austin, TX 12345, US

☐ I have not been affiliated with this organization in the past 12 months

\* Other Organization (Please specify)

2.

Figure 8



## Step 2: Affiliation Details

- If your organization is registered in SAM.gov, the organization address will be pre-populated. Enter your Department/Office/Subunit. (Figure 9).
- If your organization is not registered in SAM.gov, you must enter the required address fields denoted by a red asterisk (\*), along with your Department/Office/Subunit. (Figure 10)
- If you are currently affiliated or have been affiliated with more than one organization in the past 12 months, you must select a Primary Organization from the list. If you have an organization-approved PI role, this selection will not affect any proposal preparation or submission activities in Research.gov or Grants.gov. (Figure 11)
- Click “Next.”

Figure 9

Figure 10

Figure 11

## Step 3: Demographic Information

- Complete the required fields denoted by a red asterisk (\*). (Figure 12)
- If you have previously provided your demographic information in Research.gov or FastLane, that information will be pre-populated. Review your responses and make any necessary updates.
- Click “Next.”
- ***Important Note:*** Your Demographic Information will not be shared with your Organizational Contacts.

Figure 12



### Step 4: Additional Information

- Complete the required fields denoted by a red asterisk (\*). (Figures 13 and 14)
- If you have previously provided your highest degree, areas of expertise, or professional references, this information will be pre-populated. Review your responses and make any necessary updates.
- Click “Next.”



### Helpful Tips

- Preferred Email Address for Review/Meeting Activities will be the email address NSF will use for review activities related to panels, site visits, advisory committees, subcommittees, and committees of visitors only. Adding this preferred email address will not affect your primary, secondary, or organizational email address information in the Account Management System.
- Preferred Phone Number for Review/Meeting Activities may be used during an active panel, site visit, advisory committee, subcommittee, or committee of visitors meeting for NSF staff to contact you if you are unreachable via email. This is not for texting purposes and will not affect your other contact information in the Account Management System.
- You must provide at least one area of expertise but may not provide more than five.

### Provide Reviewer Profile Information

1. Organizational Affiliation(s) ✓

2. Affiliation Details ✓

3. Demographic Information ✓

4. Additional Information

5. Review & Confirm

Additional Information

\* Required

NSF asks for professional information to enable program officials to manage reviewer selection, as well as related merit review functions. For more information, read the [Privacy Act Statement](#).

Contact Preferences for Review/Meeting Activities

\* Preferred Email Address for Review/Meeting Activities ⓘ  
☐ CKPoneUAT@gmail.com  
☐ CKPoneUATSecondary@gmail.com  
☐ Other (Please specify)

\* Preferred Phone Number for Review/Meeting Activities ⓘ  
☐ (111) 111-1111  
☐ Other (Please specify)  
☐ Do not wish to provide

Figure 13

Degree

\* Highest Degree  

Select Highest Degree

Area(s) of Expertise

Select up to five items that best describe your area(s) of expertise. If your area of expertise is not listed, you may add your own by selecting “Other (Please specify).”

\* Area(s) of Expertise Add up to five  
1. 

Select Area of Expertise

+ Add Area of Expertise

Professional References

ORCID ID ⓘ 16-digits i.e., 1234-1234-1234-1234

Websites (e.g., Organizational faculty, staff profile, or professional website, LinkedIn, Google Scholar)  
Websites may be used for NSF selection of reviewers.

+ Add Website

Figure 14

Additional guidance including FAQs and instructional videos can be found on the Research.gov [About Account Management](#) page. Account management questions may be directed to the NSF IT Help Desk at 1-800-381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov).

Version 2.1, Updated June 26, 2023



### Step 5: Review & Confirm

- Review your information for accuracy and click “Submit.” (Figure 15)

**Provide Reviewer Profile Information**

1. Organizational Affiliation(s) ✓ 2. Affiliation Details ✓ 3. Demographic Information ✓ 4. Additional Information ✓ 5. Review & Confirm

Review & Confirm

**Organizational Affiliations**

TEST University (UEI: XXXXXXXXXXXX) (Primary)  
View SAM Legal Business Name  
123 Alpha Street  
College of Engineering  
Austin, TX 12345, US

United States Institute  
123 Beta Street  
College of Law  
Arlington, TX 12346, US

**Demographic Information**

Gender  
Male

Race  
American Indian or Alaska Native

Ethnicity  
Hispanic or Latino

Do you have a disability?  
No

**Additional Information**

Preferred Email Address for Review/Meeting Activities: CKPoneUAT@gmail.com  
Preferred Phone Number for Review/Meeting Activities: (111) 111-1111

Highest Degree  
AS - Associate in Science (2000)

Area(s) of Expertise  
Atmospheric Chemistry

ORCID iD  
None Provided

Websites  
Websites may be used for NSF selection of reviewers.  
testsite.com  
mysite.com

Figure 15

### Submission Confirmation

- View the success message on My Profile to confirm you have successfully provided your reviewer profile information. (Figure 16)
- Important Note:** The information you provided will not be immediately viewable and editable on My Profile. You must sign out of Research.gov and then sign back in again to view and edit My Profile information. Please see the [View and Edit My NSF Account Profile Information](#) job aid for detailed instructions on accessing and updating My Profile.

**My Profile**

For NSF ID [REDACTED]

✓ You have successfully provided reviewer information for your Research.gov account. This information will be available to edit the next time you sign in to your Research.gov account. You can proceed to [Panelist Functions](#) or [Proposal Review](#) in FastLane for reviewer activities.

Contact Information Demographic Information Academic/Professional Information

Update your profile information here. If you have a role at an organization, you can update your organization-specific information on [View My Roles](#).

Name  
LucyUATdemo MulveyUATdemo

Figure 16



# **View and Edit My NSF Reviewer Account Profile Information**





Once you have a National Science Foundation (NSF) account and completed the one-time process to provide your reviewer profile information, you can view and edit your account profile information at any time via the View/Edit My Profile page. Follow the step-by-step instructions below to update your account information including contact information, demographic information, and professional information.

## Step 1: Access the View/Edit My Profile page

- Open [Research.gov](https://Research.gov)
- Click “Sign In” located at the top right of the screen. (Figure 1)
- Enter your credentials (e.g., NSF ID and password) and click “Sign In.” (Figure 2)
- Click “My Profile” from the top right of the screen. (Figure 3)

**Important Note:** You can also access the View/Edit My Profile page by clicking on “View/Edit Profile” located on the left navigation bar. (Figure 4)

## Step 2: Edit your Contact Information

- Click “Edit” at the bottom of the **Contact Information** tab on the **My Profile** page. (Figure 5)
- Enter your updated contact information and click “Save.” (Figure 6)

**Important Note:**

- **If you change your primary email address (i.e., the email address used to create your NSF account), NSF will send you a verification email. You must verify the updated email address within four hours or your account email address will revert back to your last verified email address.**



Figure 1



Figure 2

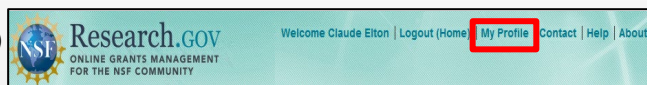


Figure 3

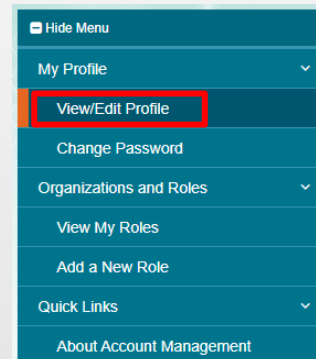


Figure 4

Figure 5

Figure 6



### Helpful Tip

To ensure compliance with NSF’s policy of allowing only one NSF account per user, you will not be able to save any email addresses to your account profile that are associated with another NSF account.





## Step 3: Edit your Demographic Information

- Click **“Edit”** at the bottom of the **Demographic Information** tab on the **My Profile** page. (Figure 7)
- Enter your demographic information for Gender, Race, Ethnicity and Disability status and click **“Save.”** (Figure 8)

### **Important Notes:**

- Submission of the requested demographic information is required for reviewers and individuals with an organization-approved PI role. Until responses to all demographic questions are provided, the “Save” button will be disabled.*** (Figure 8)
- The “Other” option for the Race question will prompt an optional free text field for entry.*** (Figure 8)

My Profile

For NSF ID [redacted]

Contact Information Demographic Information Academic/Professional Information

NSF asks for demographic data relating to gender, ethnicity/race and disability to gauge whether our programs and other opportunities in science and technology are fairly reaching and benefiting everyone regardless of demographic category; and to ensure that those in under-represented groups have the same knowledge of and access to programs, meetings, vacancies, and other research and educational opportunities as everyone else. For more information, read the [Privacy Act Statement](#).

Gender  
Unspecified, or another gender identity

Race  
White

Ethnicity  
Not Hispanic or Latino

Do you have a disability?  
No

Edit

Figure 7

My Profile

For NSF ID [redacted]

Contact Information Demographic Information Academic/Professional Information

NSF asks for demographic data relating to gender, ethnicity/race and disability to gauge whether our programs and other opportunities in science and technology are fairly reaching and benefiting everyone regardless of demographic category; and to ensure that those in under-represented groups have the same knowledge of and access to programs, meetings, vacancies, and other research and educational opportunities as everyone else. For more information, read the [Privacy Act Statement](#).

\* Required

\* Gender (Please select one)  
☐ Male  
☐ Female  
☒ Unspecified, or another gender identity  
☐ Do not wish to provide

\* Ethnicity (Please select one)  
☐ Hispanic or Latino  
☒ Not Hispanic or Latino  
☐ Do not wish to provide

\* Race (Please select all that apply)  
Race Definitions  
☐ American Indian or Alaska Native  
☐ Asian  
☐ Black or African American  
☐ Native Hawaiian or Other Pacific Islander  
☒ White  
☒ Other (Please specify) [red box]  
☐ Do not wish to provide

\* Do you have a disability? (Please select one)  
What is considered a disability?  
☐ Yes  
☒ No  
☐ Do not wish to provide

Save Cancel

Figure 8



## Step 4: Edit your Academic/Professional Information

- Click **"Edit"** at the bottom of the **Professional Information** tab on the **My Profile** page. (Figure 9)
- Reviewers can add a new Organizational Affiliation by clicking on the "Add New Organization" button and searching for the Organization by name or use the "Other" option to enter one manually. (Figure 10)
- Organizational Affiliations cannot be deleted by reviewers, but reviewers can indicate that they are no longer affiliated with an organization. (Figure 11)
- You may select a different primary Organizational Affiliation by selecting one from the drop-down. (Figure 12)
- Enter your updated academic and professional information, including Highest Degree, Area(s) of Expertise, ORCID iD and Websites, and click **"Save."** (Figure 13)

### Important Notes:

- Highest Degree and Area(s) of Expertise are required for PIs and reviewers and optional for all other users.** (Figure 13)
- Upon selection of your Highest Degree, you will be prompted to provide the Year Completed.** (Figure 13)
- If your Area(s) of Expertise is not listed, you may enter a free text entry using the "Other" option.** (Figure 13)

Figure 9

Figure 10

Figure 11

Figure 12

Figure 13



### What do I do if I accidentally delete the verification email sent by NSF?

- Select the **“View/Edit My Profile”** option. (Refer to Step 1 in the [“View and Edit My NSF Reviewer Account Profile Information”](#) job aid)
- Within the **Contact Information** tab on the **My Profile** page, click **“Pending Your Verification”** located to the right of the primary email address. (Figure 14)
- Select **“Click here to Resend the verification link email.”** (Figure 15)
- A new verification email will be sent to your pending primary email address (i.e., the updated email address entered in Step 2 in the [“View and Edit My NSF Reviewer Account Profile Information”](#) job aid).

**Important Note:** NSF will send you a verification email. You must verify the updated email address within four hours or your account email address will revert back to your last verified email address.

If the four hours have passed, the resend verification email option will not be available and you will need to restart the process by updating your email address again. (Refer to Step 2 in the [“View and Edit My NSF Reviewer Account Profile Information”](#) job aid)

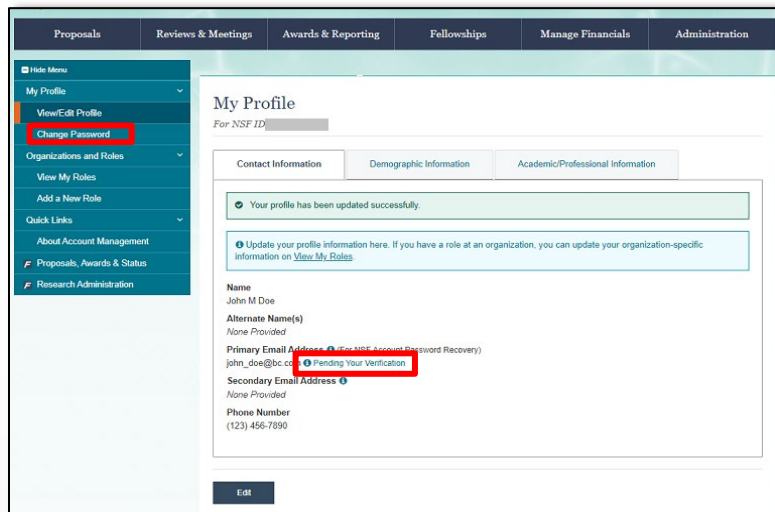


Figure 14

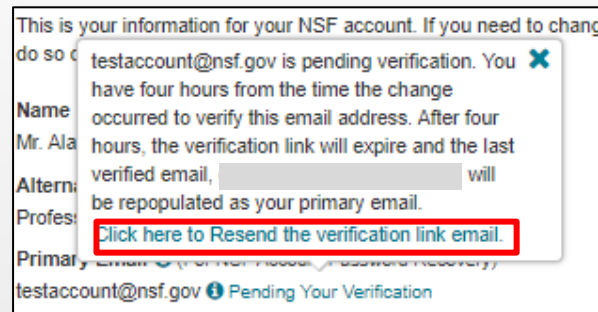


Figure 15



### How do I change my password?

- Select the “**View/Edit My Profile**” option. (Refer to Step 1 in the [“View and Edit My NSF Reviewer Account Profile Information”](#) job aid)
- Click “**Change Password**” located in the left navigation bar. (Figure 14)
- Update your password and click “**Change Password.**” (Figure 16)
- Once your password is successfully changed, you will receive a password change notification on the screen. (Figure 17)
- You have successfully changed your password!
- Click “**Continue to Research.gov**” to keep working. (Figure 17)

Change Password  
For Research.gov and FastLane

Enter your temporary password as received to change your password.

Enter your current password and then create a new password.

NSF ID

Current Password

New Password

Confirm Password

Your password needs to:

- Have at least 8, but no more than 20 characters
- Avoid using spaces
- Meet 3 of the 4 rules:
  - At least one lowercase letter
  - At least one capital letter
  - At least one number
  - At least one of the permitted special characters # & % ! @ ( )

Note: you cannot re-use your last 6 passwords

Change Password Cancel

Figure 16

Change Password  
For Research.gov and FastLane

Success - Password Changed

Your password has been successfully changed in Research.gov and FastLane.

In the future, if you need to change your password, click the “My Profile” link on the top right of the page and select “Change Password”.

Continue to Research.gov Continue to FastLane

Note: Most FastLane functions can be reached directly from Research.gov, without the need to sign in again.

Figure 17



### Helpful Tip

Passwords are valid for 365 days before required renewal.



## View My Reviewer/Meeting Participant Information



The View My Roles page shows the organizational roles you have requested which are pending approval or disapproval from your organization's Administrator as well as your existing approved roles. Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. You may view and edit your organizational affiliations, preferred phone number and email for review activities by following the step-by-step process below.

## Access the View My Roles page

- Open [Research.gov](#)
- Click **"Sign In"** located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click **"Sign In."**
- Click **"My Profile"** located at the top right of the screen.
- Click **"View My Roles"** from the left navigation bar.
- The **"View My Roles"** page displays the following information:
  - **Reviewer/Meeting Participant Information:** Displays all your organizational affiliation(s) that are active or have been active in the past 12 months if you are a reviewer. If you are not a reviewer, this information will not be displayed. (Figure 1)
  - **Requested Role(s):** Displays all organizational roles that you have requested that are pending approval from your organization's Administrator. (Figure 1)
  - **Active Role(s):** Displays all your approved organizational roles. (Figure 1)

## How do I change organization contact information if I am a reviewer?

- Click **"Edit in My Profile"** in the "Action" column located on the right side of the Reviewer/Meeting Participant Information table. (Figure 1)
- You will be navigated to the **"Contact Information"** tab on My Profile where you can edit your preferred email address or phone number for review/meeting activities. You can update your organizational affiliation(s) on the **"Academic/Professional Information"** tab on My Profile. Please see the [View and Edit My NSF Account Profile Information](#) job aid for detailed instructions on accessing and updating My Profile.

## How do I change organization contact information if I am a PI, co-PI, or Proposed Postdoctoral Fellow or I have another organizational-approved role?

- Please see the following job aids for detailed instructions on viewing requested and active organizational roles:
  - [View My Organizational Roles – Requested Roles](#)
  - [View My Organization Roles – Active Roles](#)

The screenshot shows the 'View My Roles' page. At the top, there is a header 'View My Roles' and a note: 'If you are a reviewer or meeting participant affiliated with an organization, you can update your information in My Profile. To remove an active role from an organization you are no longer affiliated with, contact the organization's administrator. To remove a Proposed Postdoctoral Fellow role, contact the NSF Help Desk at 1 (800) 381-1532 or [rgov@nsf.gov](#).' Below this is a section titled 'Reviewer/Meeting Participant Information' with a table of organizational affiliations. The table has columns: 'Organizational Affiliations for Review Activities', 'Phone Number for Review Activities', 'Email for Review Activities', and 'Actions'. The first row shows 'Test University (UEI: XXXXXXXXXXXX) (Primary)' with phone '(123) 123-4568' and email 'Jane.DocTEST@test.com'. An 'Edit in My Profile' link is in the Actions column. Below this is a 'Requested Role(s)' section with a table of requested roles. The table has columns: 'Organization Name', 'Work Phone', 'Work Email', and 'Action'. A message states 'There are currently no Requested Roles.' Below this is an 'Active Role(s)' section with a table of active roles. The table has columns: 'Organization Name', 'Work Phone', 'Work Email', and 'Action'. The first row shows 'Test University (UEI: XXXXXXXXXXXX) (Primary)' with phone '(123) 233-5234' and email 'Jane.DocTEST@test.com'. An 'Edit Your Contact Info See Org Contact(s)' link is in the Actions column. Below this is a table of active roles with columns: 'Role(s)', 'Date Added', and 'Primary Organization'. The first row shows 'Principal Investigator / co-Principal Investigator (PI)' with date '02/28/2023' and 'Primary Organization'.

Figure 1